LIFE PROTECTOR

What to bring for your first appointment

To provide you with the best financial advice we can, we need to understand your financial life as thoroughly as we possibly can. When you first meet with us, we ask you to bring along the following information and documentation that is relevant to your situation.

1. Assets information

Your most recent investment statements and other relevant asset information about what you own.

2. Expenses

Consider how much you spend each month and any planned purchases or expenses over
the next 3-5 years.

3. Income

Please bring details about your sources of income.

4. Insurance

Copies of any Trauma, Income Protection, Total and Permanent Disablement or Death cover you have in place.

5. Mortgages/Loans/Credit Cards

Please provide details about any debts you have incurred and are currently repaying.

6. Retirement income stream

Details about any pensions or annuities you already have in place if you are already retired.

7. Self Managed Super Fund

Please bring your Trust deed, account information and investment strategy and placement details.

8. Superannuation

Bring your latest member benefit statement and member booklet (if you have it).

9. Tax return

And finally, bring along your most recent tax return – both personal and business (if applicable).

We look forward to working with you.